Guide to Dashboards

Dashboards provide a powerful way to gain visibility and oversight into performance. In this guide, learn about your Dashboard choices and how to customize them for your team.

It's Easy

Select Reports from the drop-down navigation menu to access Dashboards and Analytics reports.

1 Select a Dashboard

Select a Dashboard from the drop-down menu (e.g., Goals, Performance) on the Dashboards tab.

2 Refine as Needed

Use Dashboard Settings to refine the data in the Dashboard charts by selecting people, data sets, and filters. **NOTE:** People menu selections are based on the permissions your system administrator assigned to you.

3 Update the Results

Click Update to refresh the data displayed in the charts.

4 Analyze the Data

Use the drop-down menus to further refine the data displayed in the charts.

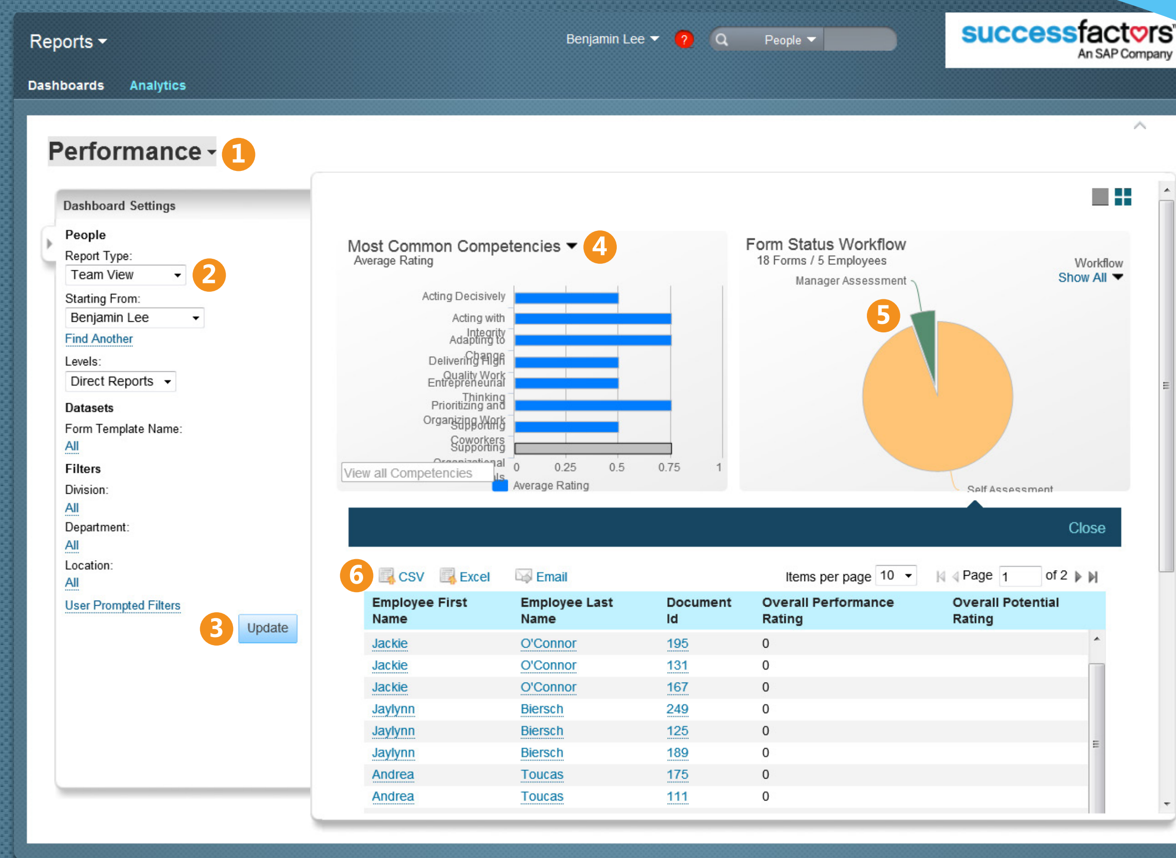
5 Drill Down to View Details

Click on a chart segment to reveal the underlying data, in a report table at the bottom of the screen.

6 Take Action

Click these icons in the report table to take these actions:

- Export as CSV: Export the report data as a CSV file.
- Export To Excel: Export the report data to Microsoft Excel for additional analysis.
- Send Email: Communicate directly with the participants listed in the report.



Spotlight: Dashboard Settings

Use Dashboard Settings to select the people to report on, data sets to draw from, and filters to apply to focus the Dashboard results.

To use Dashboard Settings:

1. Select People using the drop-down menus: Report Type, Starting From, and Levels.
2. Select Datasets by clicking the active Form Template Name link. A new window opens. Select the forms to draw the data from and click OK.
3. Use Filters to select specific divisions, departments, and locations to include.
4. Click Update to refresh results.